



NATIONAL COUNCIL *on*
TEACHER RETIREMENT
*Supporting Retirement Security
for America's Teachers*

NATIONAL COUNCIL ON TEACHER RETIREMENT

◆ 2019 ANNUAL TRUSTEE WORKSHOP ◆

PRESENTED IN AFFILIATION WITH THE UC BERKELEY CENTER FOR EXECUTIVE EDUCATION AT
THE HAAS SCHOOL OF BUSINESS, UNIVERSITY OF CALIFORNIA, BERKELEY

AGENDA

Sunday, July 21, 2019

- 4:15 – 5:30 pm **New Trustee Forum (3 years or less of experience)**
- **NCTR – Get to know the Team**
Maureen H. Westgard, Executive Director
Robyn Wheeler, Assistant Executive Director
Delia Richardson, Communications Director
Leigh Snell, Director of Federal Relations
 - **Overview of Roberts Rules**
Dana Dillon, Former Board Chair, CalSTRS
 - **Question & Answers and Feedback Session**

6:15 – 7:00 pm Registration Opens

6:30 – 9:00 pm **Welcome Reception and Dinner for attendees & registered guests**

Monday, July 22, 2019

TRUSTEE WORKSHOP, DAY ONE

7:00 am Breakfast for all attendees at hotel

8:00 – 8:30 Depart for UC Berkeley Campus

8:30 – 9:00 **TRUSTEE WORKSHOP BEGINS**

WELCOME FROM NCTR PRESIDENT

Roger Rea, President, NCTR, and Board Member, Omaha SERS

WELCOME

Maureen H. Westgard, Executive Director, NCTR
Greg La Blanc, Lecturer, HAAS Business School

9:00 – 10:00 **KEYNOTE: INVESTING IN THE NEW ECONOMY**
Rich Lyons, PhD, Former Dean, Haas School of Business

10:00 – 10:30 Break



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Monday, July 22, 2019 (continued)

10:30 – 12:00	ARTIFICIAL INTELLIGENCE AND INVESTMENTS <i>Ken Goldberg, PhD, Professor, UC Berkeley</i>
Noon	Lunch at UC Berkeley
1:00 – 2:00 pm	FEDERAL RELATIONS UPDATE <i>Leigh Snell, Federal Relations Director, NCTR</i>
2:00 – 2:30	Break
2:30 – 4:00	DC PLANS – WHAT YOU NEED TO KNOW <i>Nari Rhee, Associate Academic Specialist, UC Berkeley</i> <i>Leon F. "Rocky" Joyner, Jr., Vice President and Actuary, Segal Consulting</i>
4:00	Depart for hotel
6:00	Depart for dinner
6:30	Offsite Dinner
8:30	Return to hotel

Tuesday, July 23, 2019

TRUSTEE WORKSHOP, DAY TWO

7:00 am	Breakfast for all attendees at hotel
8:00 – 8:30	Depart for UC Berkeley Campus
8:30	TRUSTEE WORKSHOP BEGINS
8:45 – 10:00	HEDGE FUNDS- CURRENT STATE AND CONSIDERATIONS/PITFALLS <i>Dave Francl, Managing Director, San Francisco Employees' Retirement System</i>
10:00 – 10:30	Break



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Tuesday, July 23, 2019 (continued)

10:30 – Noon	THE POWER OF PERSONALIZED MEDICINE <i>Jeffrey Shaman, PhD, Coriell Life Sciences</i>
Noon – 1:00 pm	Lunch at UC Berkeley
1:00 – 2:30	COMPETING PRIORITIES IN PENSION FUND MANAGEMENT <i>Thomas Gilbert, Associate Professor of Finance, University of Washington</i>
2:30 – 3:00	Break
3:00 – 4:00	ESG INVESTING <i>Greg La Blanc, Lecturer, HAAS Business School</i> Panel TBD
4:00	NCTR STRATEGIC PLAN UPDATE <i>Maureen Westgard, Executive Director, NCTR</i>
4:30	Depart to hotel
6:00	Depart for dinner
6:30	Offsite Dinner
8:30	Return to hotel

Wednesday, July 24, 2019

TRUSTEE WORKSHOP, DAY THREE

7:00 am	Breakfast for all attendees at hotel
8:00 – 8:30	Depart for UC Berkeley Campus
8:30	TRUSTEE WORKSHOP BEGINS



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AGENDA

Wednesday, July 24, 2019 (continued)

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| 8:45 | COMMUNICATIONS – Negotiating and Influence
<i>John Danner, PhD, Lecturer, HAAS Business School</i> |
| 10:00 – 10:30 | Break |
| 10:30 – Noon | COMMUNICATIONS – Negotiating and Influence (continued) |
| Noon | SYNTHESIS AND REVIEW
<i>Greg La Blanc, Lecturer, HAAS Business School</i> |
| 12:30 – 1:15 pm | Lunch at UC Berkeley |
| 1:15 pm | Tour of Berkeley |
| 3:30 | Return to hotel |
| 6:00 | Dinner at hotel for all attendees |

Thursday, July 25, 2019

Trustee Workshop, Departures